



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA of Snohomish County Stock Transfer Instructions

- I. Donors can instruct their financial institution to transfer securities electronically to:

UBS
Account # 7F 05035
Account Name: YMCA of Snohomish County
DTC # 0221

YMCA Federal Tax ID: 91-0565561

Contact Name: Jason Therrell
425.349.0455 (direct)
844.847.3063 (toll free)
877.740.5249 (fax)

To ensure that the contribution is receipted in an expedient manner, please communicate the stock transfer request in writing or electronically to the YMCA. Information to include in the letter or e-mail: name of donor, name and number of shares donated, share valuation, and campaign for which the donation is being made. If emailing, please copy Chief Development Officer, Jennifer Willows at jwillows@ymca-snoco.org and Chief Financial Officer, Susan Cournoyer at scournoyer@ymca-snoco.org.

- II. If securities are delivered to YMCA in certificate form and registered in the name of YMCA, the following documents must be presented with each security:

1. Corporate Resolution - completed and signed by an authorizing officer of the YMCA. It must be currently dated (six months) and either bear seal or indicate that there is no seal. Corporate Resolution available upon request
2. Stock Power Form - must be signed by a different officer than one signing Corporate Resolution. Stock Power Form available upon request
3. Letter of instruction authorizing to transfer securities to new ownership.
Sample Letter attached

- III. In case of securities being delivered to YMCA in certificate form and registered in the name(s) of a donor (Third Party Transfer), the following documents must be presented with each security:

1. Security must be properly endorsed on the back of certificate or a stock power form must be signed. Stock Power Form available upon request
2. Authorization to transfer security to YMCA must be completed and signed by all parties registered on the certificate. Security Transfer Authorization Form available upon request

YMCA OF SNOHOMISH COUNTY

Association Office
PO Box 419, Everett WA 98206-0419
P 425 740 9622 F 425 257 9920 W ymca-snoco.org



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

SAMPLE LETTER

<Month Date, Year>

<Donor Name>

<Address Line 1>

<Address Line 2>

<City>, <State> <ZipCode>

Donor's Broker
Brokerage Firm
Address

Dear Broker:

This is my formal request to you to please transfer from my account # _____ to the brokerage account of the YMCA of Snohomish County (USB, c/o Jason Therrell, DTC #0221, Account #7F 05035), a charitable donation of ____shares of _____.

A copy of this letter has been sent to the YMCA of Snohomish County and to their broker, USB, 1604 Hewitt Avenue, Suite 601, Everett, WA 98201-3536.

This gift is intended to support the _____ Campaign.

Sincerely,

Donor Name

Copies:

Susan Cournoyer
Chief Financial Officer
YMCA of Snohomish County
PO Box 419
Everett, WA 98206-0419

Jason Therrell
425 349 0455
USB
1604 Hewitt Avenue, Suite 601
Everett, WA 98201-3536

YMCA OF SNOHOMISH COUNTY

Association Office
PO Box 419, Everett WA 98206-0419
P 425 740 9622 F 425 257 9920 W ymca-snoco.org